

## Bancassurance Senario 2 Notes

1. Maintain a single CRM and Customer data servers, this will prevent fragmenting.
  - a. Leveraging IT to Win in Bancassurance Segment By: Finacle pg 3
2. Structure of the how the company is built and how the first stage of Development needs to progress.
  - a. Archisurance Case Study By: The Open Group
3. <http://economictimes.indiatimes.com/definition/bancassurance>
  - a. For Bancassurance definition
4. The suggestion part from my work experience, PING AN Insurance Company, Start from an Insurance company then expand to bank, my example basic from this company, but because it's a China company, there are not many detail discuss about this case
  - a. [http://en.wikipedia.org/wiki/Ping\\_An\\_Insurance](http://en.wikipedia.org/wiki/Ping_An_Insurance)
  - b. <http://about.pingan.com/en/index.shtml>
5. I looked at the BOK information from Assignment one and the information on bancassurance to derive a general model of a Bank structure.
  - a. BOK.com
6. We got the contributions of Loans, deposits and how they work together from
  - a. Finacle Core Banking Solution By: Finacle
7. Web Portal help access:
  - a. We got together and discussed the different types of customer service request forms we have seen.
    - i. TD Ameritrade has the Chat bubble you can click on from any page, then it has the helpCenter and Contact Us pages.
    - ii. BOK.com has a ContactUs page that allows you to fill out the form for email, as well as telephone numbers and store locations.
    - iii. Spherexx.com has a Live chat bubble, and number on the front page, then a Contact us page for more information.
    - iv. Pandora.com has a help page off the login page that allows you search a knowledge base.
  - b. After discussion we determined that it would be best to just indicate that the Web Portal had these types of feature.
    - i. This would indicate something like [www.ok.aaa.com](http://www.ok.aaa.com) that has links to each of its help and knowledge base info at the bottom.
8. We then looked at bank and insurance websites to see how they organized the account access.
  - a. TDAmeritrade.com
  - b. BOK.com
  - c. Google.com – good reference for multiple types of account information in separate areas.
    - i. This would be good to idealize when building the website to navigate between insurance and banking.
9. <http://pubs.opengroup.org/architecture/archimate2-doc/> Ch9
  - a. This gave details on the Archimate views.